Manage the Appointment Grid

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Make and manage appointments using the functionality available on Zedmed's Appointment Grid.

Useful resources

- Appointment display options to change what is shown in the Zedmed Appointment Book.
- Appointment Report to view cancelled or missed appointments and SMS patients.
- Surgical bookings procedure.
- Right-click option descriptions.

Quickstart video

Book an appointment

This section explains how to create an appointment for an existing patient. To learn more, see the Appointment options guide.

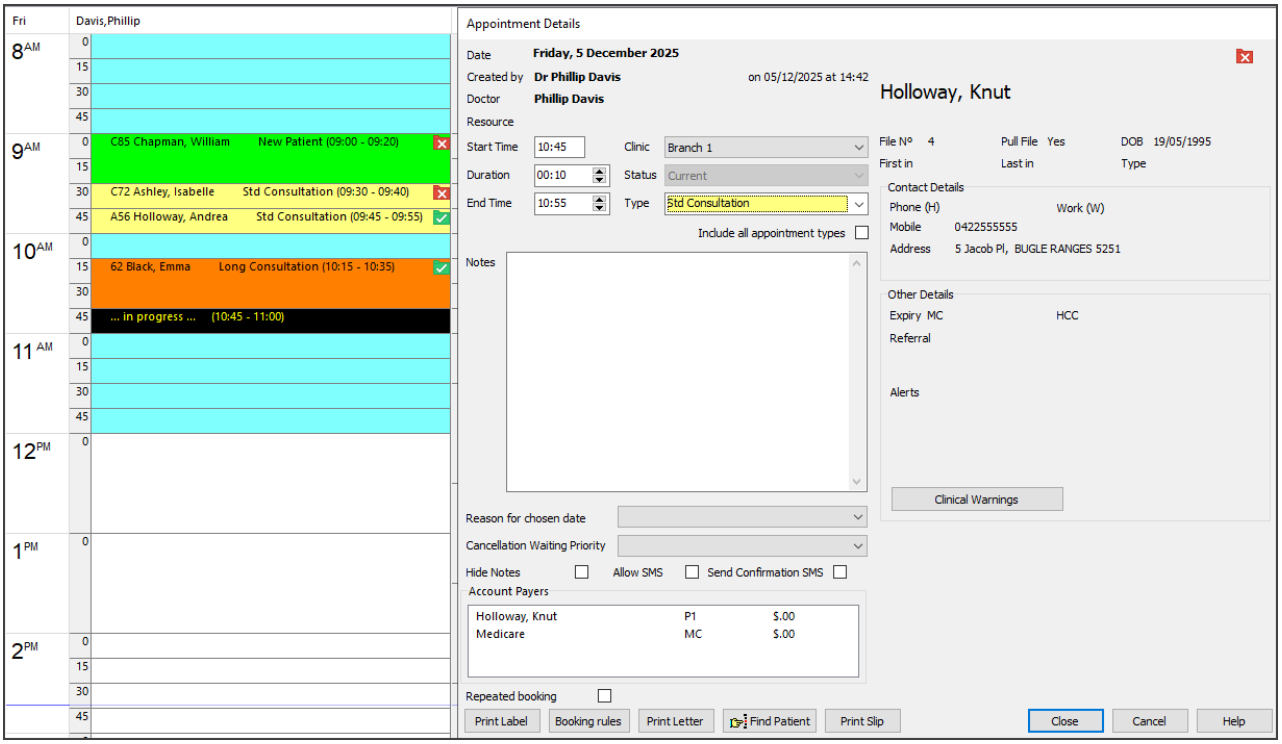
To make an appointment:

1. On the **Reception** tab, select **Appointments**.

   The Appointment Book shown is for the branch you logged into.
2. Under the relevant practitioner/resource, double-click or right-click the time slot.
3. Search for and select the patient.

   The **Appointment Details** screen will open.

   Referrals or **Alerts** will appear on the right under **Other Details.**
4. In the **Type** field, select the **Appointment Type**, and the duration and end time will adjust automatically.
5. Optional:
   - **Duration -** can be changed and the **End Time** will update accordingly.
   - **Start Time** - can be changed in Zedmed v38.7. It does not need to match the slot's start time.
   - **Notes** - to record information relevant to the booking.
   - **Include all appointment types -** overrides limitations on Appointment types. Zedmed v38.8 and later.
6. Select **Close** to save the appointment.



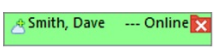
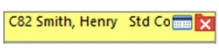
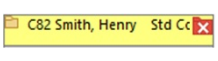
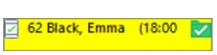
Find or Cancel an appointment

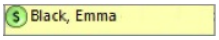
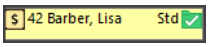
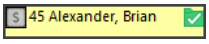
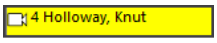
Use our dedicated guides to:

- Find an Appointment
- Cancel an Appointment.

Appointment icon explanations

The following icons indicate the patient's status.

Icon	Description	Explanation
	Green tick (left)	Patient has been attended to the Waiting Room.
	Red folder + cross	The patient's IHI is unavailable.
	Green folder + tick	The patient's IHI is available.
	Cloud icon	The patient made the appointment via Online Appointments.
	Cloud icon with +	A patient's first Online Appointment needs reconciling.
	Credit card	Credit card provided.
	File folder	File pulled. Patient not attended. Replaced by green tick when attended.
	Phone icon	Patient replied YES (green tick) to reminder SMS. Replaced when attended.
	Yellow dollar	An invoice has been raised. Replaces the attended tick.

	Green dollar	An invoice has been receipted. Replaces the attended tick.
	Grey dollar	An invoice has been voided. Replaces the attended tick.
	Yellow dollar square	The invoice was manually changed to raised.
	Green dollar square	The invoice was manually changed to receipted.
	Grey dollar square	The invoice was manually changed to voided.
	Camera + green tick	Telehealth appointment. Camera changes to a green tick when attended

Repeat, linked and multiple bookings

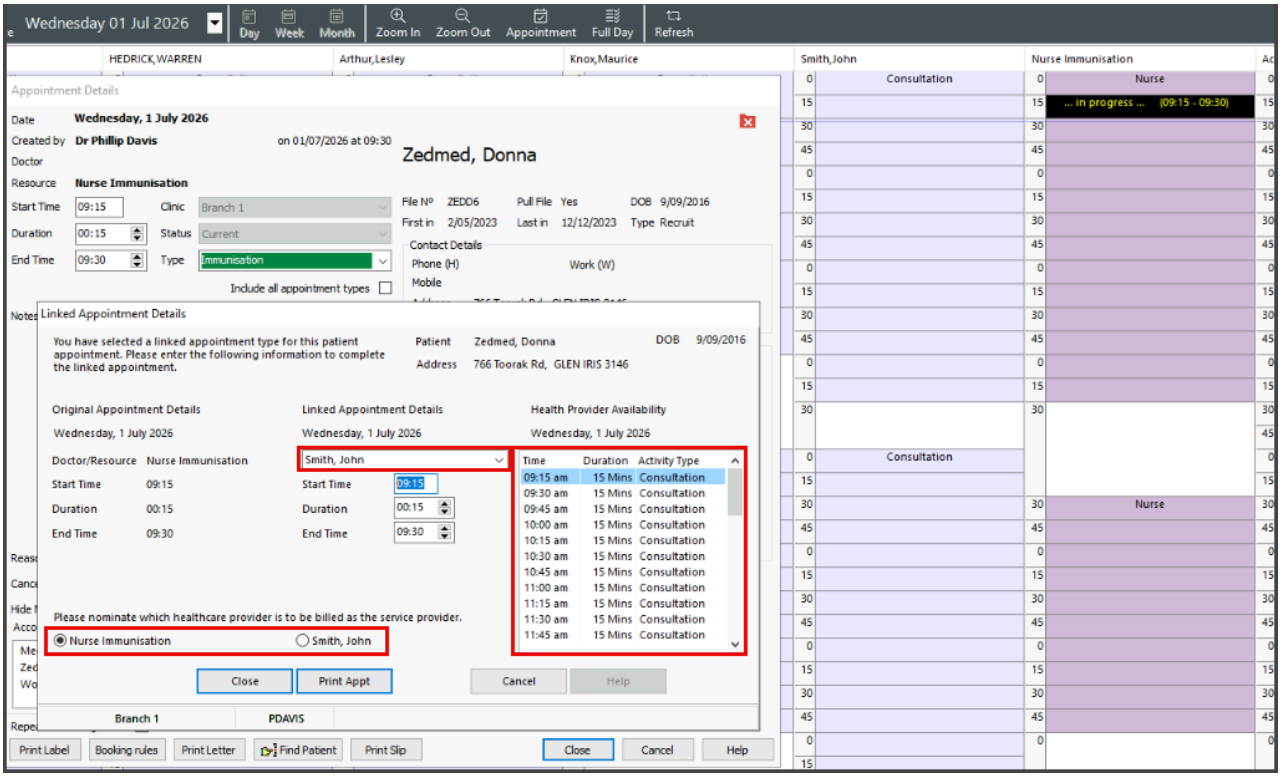
These topics are extensions of the **Make a Patient Appointment** section above.

Repeat bookings

Selecting **Repeated booking** on the **Appointment Details** screen will enable the **week(s) frequency** and **Booking period** fields. Use these fields to repeat the appointment every X weeks for a selected number of weeks (up to 52). When you select **Close**, the list of appointments and any conflicts will be displayed.

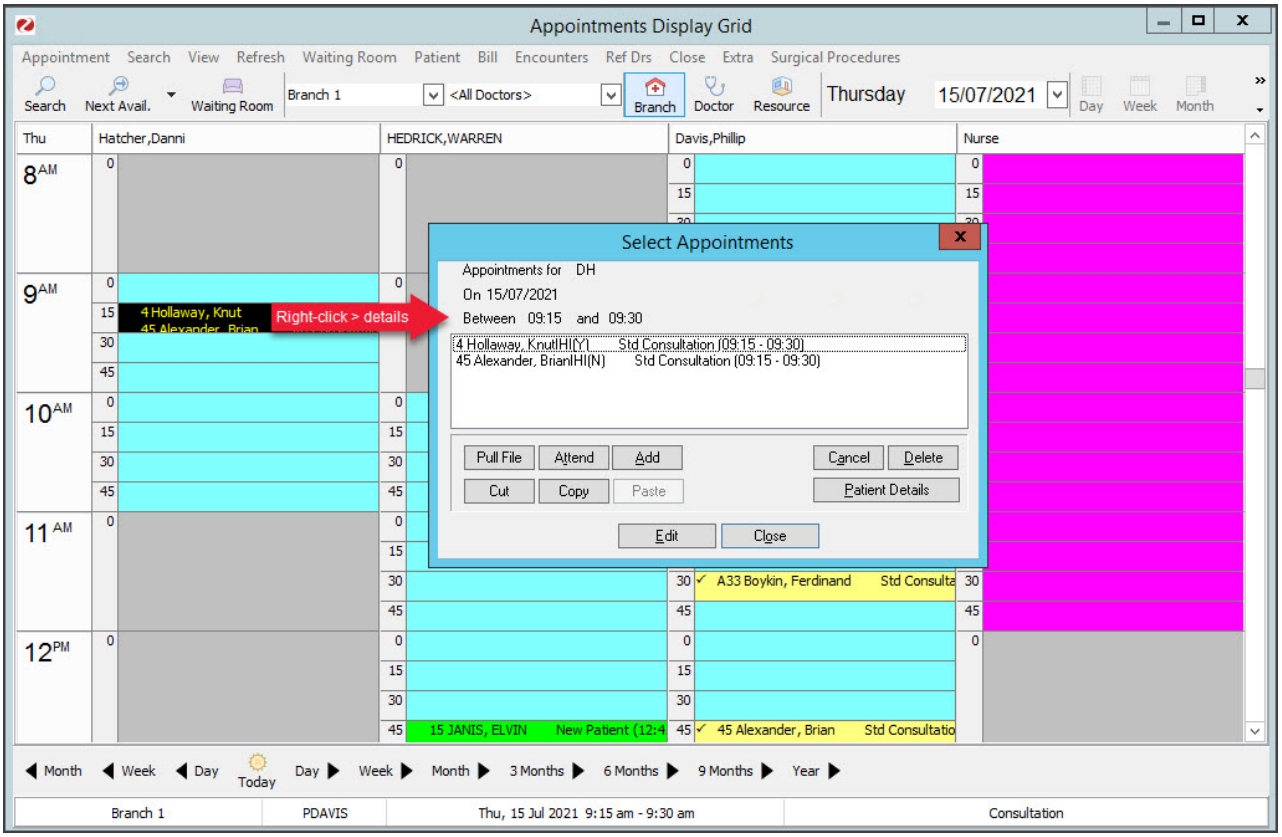
Linked bookings

Appointment types can support **Linked Appointments**, allowing you to connect two practitioners/resources. This is useful when the practitioner providing the service is different from the one billed for it. For example, an immunisation appointment may have a nurse for the attendance and a doctor to charge it to. After you save (Close) an appointment that supports linked bookings, the **Linked Appointment Details** screen will appear; simply select the second practitioner/resource and choose the second time slot - available time slots will be on or after the first appointment. Select **Close** to save, and the two bookings will appear for the one patient.



Multiple bookings

You can create multiple bookings in any time slot. You will be warned of possible conflicts and the same time slot will display in red. There is limited space to show the details, so double-click the booking to view the specific information.



Use the Cancellation Waiting List

If a patient makes an appointment but prefers an earlier time, they can be added to the Cancellation Waiting List and given priority. When another patient's appointment is cancelled, you can check the waitlist and move a patient to the new appointment time based on their priority.

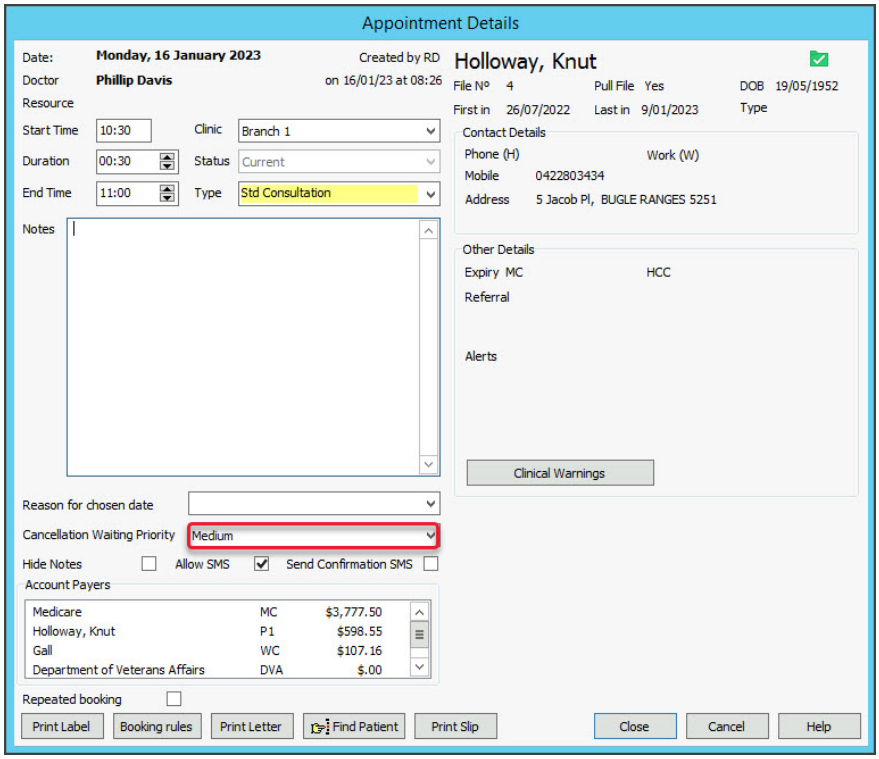
Add an appointment to the Cancellation Waiting list

To waitlist an appointment, the patient must first have a booking:

1. Open the **Appointment Details** screen.
2. Create the appointment.

   If the patient already has an appointment, locate and open their appointment.
3. In the **Cancellation Waiting Priority** field, select a **Low**, **Medium** or **High** priority, this adds the patient to the Cancellation Waiting List.

   To remove a patient from the waitlist, change the **Cancellation Waiting Priority** field back to blank.



Book an appointment from the Cancellation Waiting list

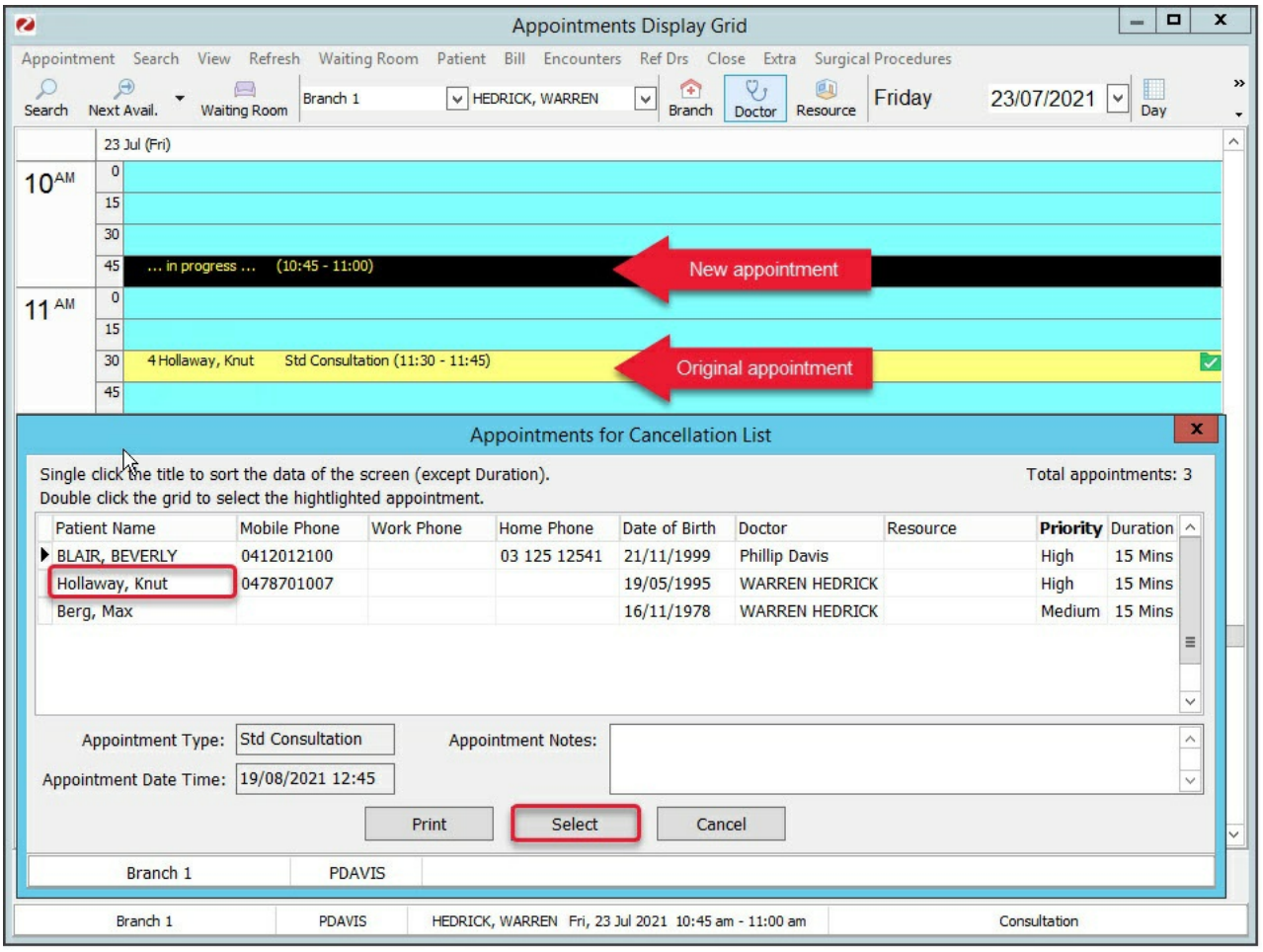
To move a waitlisted appointment:

1. Right-click the spot made available by the cancelled appointment.
2. Select **Add (From the Cancellation Waiting List).**

   The **Appointments for Cancellation List** screen will open.

   This lists the patients who want an earlier appointment time, their waiting list priority and contact phone numbers.
3. Select the patient to add in the new time slot.
4. Click **Select** and the patient will be moved to this spot.

The patient added to the new appointment will have their previous appointment removed and they will be removed from the Cancellation Waiting List.



Make a non-patient appointment

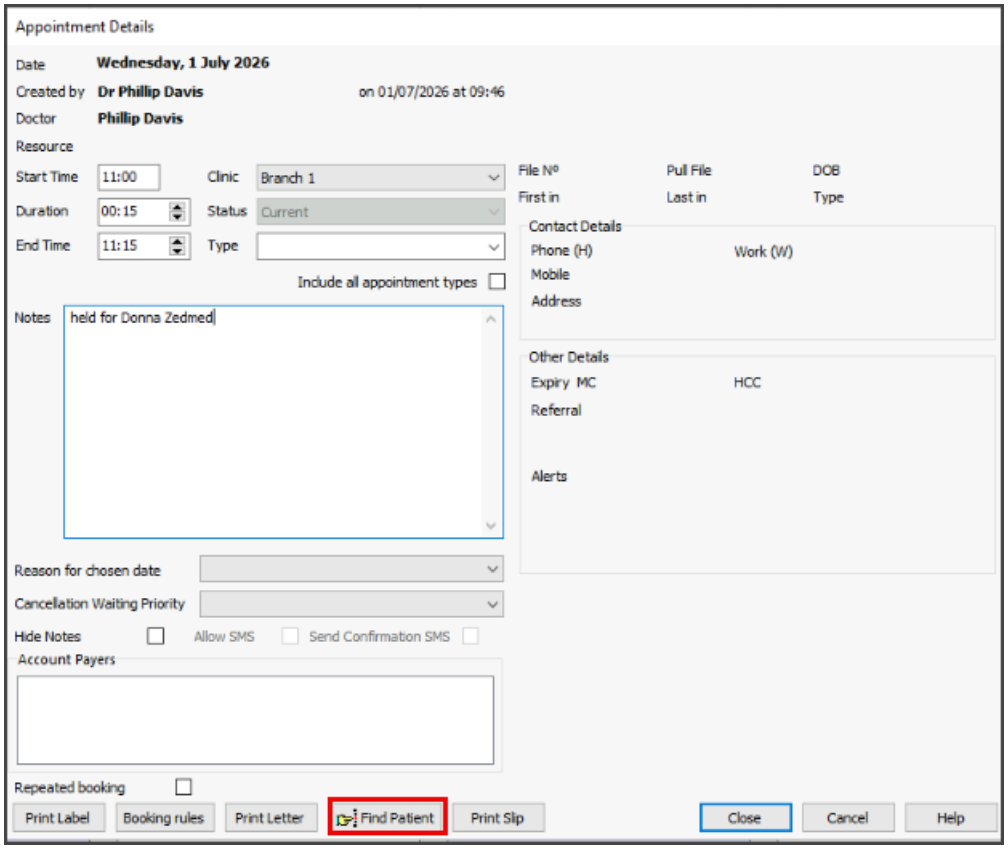
New patients often have a patient record created before you make an appointment. Sometimes you may want to make an appointment for someone without a patient record or, at the very least, hold an appointment slot for them while waiting for the patient information to be provided.

To book an appointment for a non-registered patient:

1. In the **Reception** tab, select **Appointments**.
2. Right-click the relevant time slot and select **Add (Non-Patient)**.

   The **Appointment Details** screen opens with many fields disabled.
3. Fill in the relevant appointment details:
   - In the **Type** field, select the Appointment Type.
   - If required, change the **Duration**, the **End Time** will update accordingly.
   - Use the **Notes** section to record information relevant to the booking.
4. Select **Close** to save the appointment.

   When the patient arrives, double-click the appointment to open it and use the **Find Patient** button, then select **New** to start the Add Patient process. When you have completed their registration details, you will be returned to the **Appointment Details** screen and can **Attend** them directly.
5. You can also use the **Add (Non-Patient)** feature to book a practitioner's time for non-patient activities such as meetings or report writing.



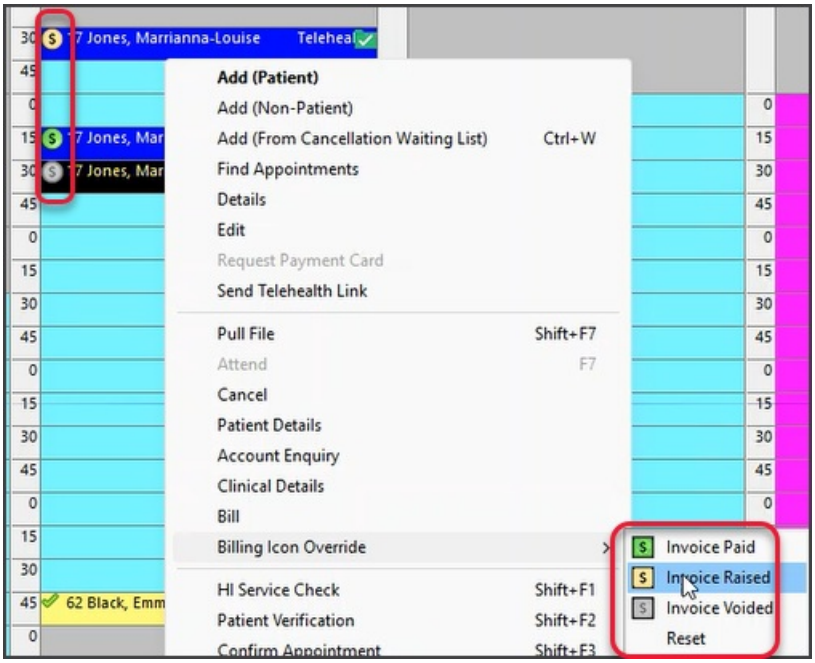
Manually change the billing status

Zedmed v39.6 and later allows you to manually change an appointment's billing status. This is useful for Practices that do not follow the expected workflow of attending patients before the consultation starts.

- The override does not change the status of the actual invoice saved in Account Enquiry.
- A manually changed billing status uses a square icon instead of a round one to distinguish it.
- Use the Reset option to revert back to the billing status before manual override was used.

To manually change the billing status:

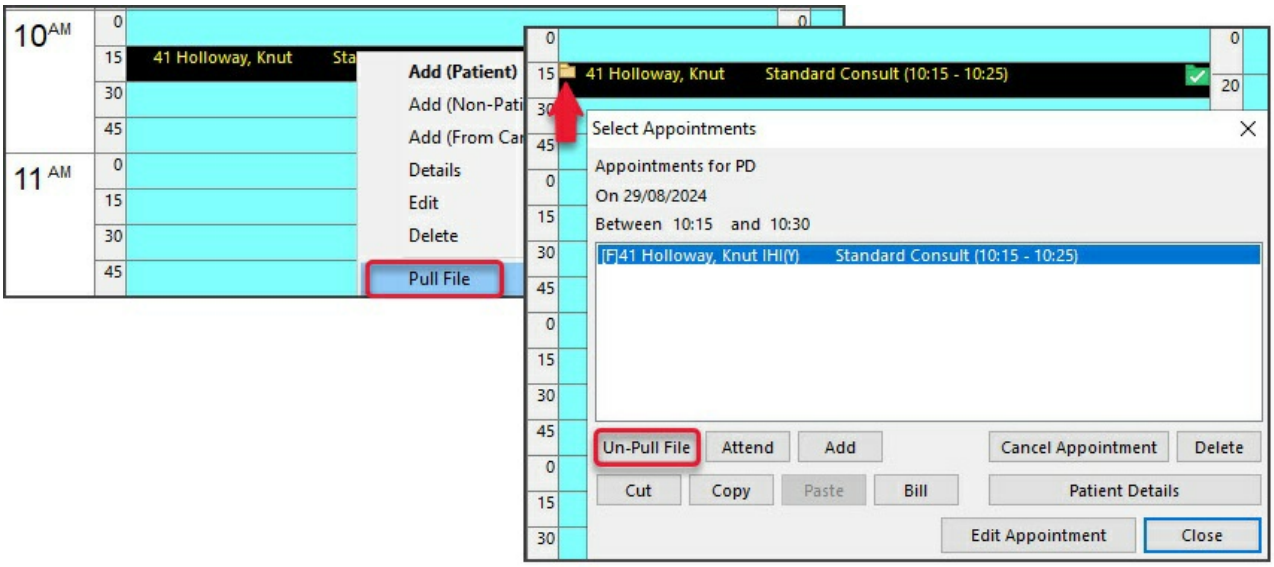
1. Right-click the patient appointment.
2. Select Billing Icon Overrides.
3. Select the required status: Invoice Raised, Invoice Paid, Invoice Voided or Reset.



Pull a physical file

For practices using physical patient files, you can right-click an appointment and select **Pull File**. This will place a folder icon next to the patient in the Appointment Book to indicate the patient file has been pulled for the doctor.

You can then right-click **Un-Pull File** when the file is returned.



To learn more, see: Appointment book time slot options